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ARIZONA LABOR MARKET INFORMATION NEWSLETTER

Vol. X No. 7
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Unemployment Rate

Seasonally Adjusted
May*

ARIZONA	6.4%
Maricopa Co.	5.0%
Pima Co.	5.3%
UNITED STATES	7.3%

Consumer Price Index

National-May
1967 - Base Year

Wage Earner/Clerical Worker -	321.4
% Chg. Yr. Ago	1.1
All Urban -	326.3
% Chg. Yr. Ago	1.6

Phoenix-1st Qtr. 1986
1977 - Base Year

All Urban -	191.6
% Chg. Yr. Ago	2.0

Tucson-1st Qtr. 1986
1st Qtr. 1983 - Base Qtr.

All Urban -	115.7
% Chg. Yr. Ago	2.2

* Preliminary

Women's Work?

One of the earliest secretaries in recorded history was the Greek, Eumenes, who served as private secretary to King Philip of Macedon and later to Alexander the Great in the 300s BC. Cleopatra had a secretary named Diomedes. Before becoming part of the explorer team of Lewis and Clark, Meriwether Lewis was private secretary to President Thomas Jefferson.* What did these secretaries have in common? They were men.

Yet according to the United States Bureau of Labor Statistics, the percentage of secretaries who are male in the U.S. today is only about 1 percent. What caused the shift in the composition of the secretarial profession from males to females? Have other occupations that are often considered "women's work" ever been considered "men's work"?

Researcher Alice Kessler-Harris has written that sharp distinctions between male and female jobs did not exist in the preindustrial society, when the tasks of all family members revolved around the household that constituted the center of production. The transition from the relatively self-sufficient domestic economy to dependence on trade took hundreds of years and developed at various speeds in different areas.

The commercial revolution of the thirteenth century created a market for manufactured goods and encouraged families to produce goods for cash. But until at least the middle of the eighteenth century, there was little market for the exchange of goods. Households continued to operate as units of production centered around self-supporting farms or artisan shops.

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Arizona Labor Market Information Newsletter
WINNER OF THE ICESA 1985 LMI PUBLICATION AWARD

Nancy Augustin, editor
Processed by RA Clerical Support Unit

Author Barbara Mayer Wertheimer found that among the settlers in the American colonies, the home was also the factory of the day where women produced almost all that the family needed and consumed. Through their productive and managerial skills, the women determined how well their families would live. If they could produce more than their families needed, they could sell or barter the extra for additional comforts.

The woman of that time produced at home almost everything that her family used or ate. She grew much of her family's food and preserved enough to last through the winter. She made butter, cheese, bread, candles, and soap. She gathered and dried wild herbs used in food preservation and as medicines. She served as doctor, nurse, and midwife within her own family and for others. She also spun and dyed yarn that she wove into cloth and cut and hand-stitched that cloth into garments.

For women who needed paid employment, domestic service was a respected and comparatively well-paid occupation. In fact, it was a legitimate apprentice trade for a girl, enabling her to learn spinning and weaving. Many sisters and daughters of prominent citizens also did domestic work for brief periods before marriage. In addition, domestic service offered an acceptable way for spinsters to earn a living.

Since early census takers counted nurses and teachers as domestic servants, the actual number of women in paid household work is not clear, but it appears that over 80 percent of the household servants were women. This profession did not lose status until after the Revolutionary War when spinning, baking, soap making, and canning were gradually removed from the home to the factory, leaving only the unskilled housework for women domestics.

Since textiles from England were expensive and the shipments irregular, almost every woman spent as much time as she could in weaving homespun cloth. As early as 1640, the production of cloth was encouraged by court order in New England, and women ran spinning schools to train young girls and boys. Several colonies regularly assigned quotas for the production of yarn and cloth to families according to their size.

The small businesses that were started to meet the needs of the rapidly growing population were usually run by husbands and sons within their houses or on their property. They depended on their wives and daughters for additional labor. Thus the women learned to shoe horses, cut and trim tin plates, sew uppers onto leather soles, tend the store and keep the books, or operate a saw or gristmill. During the critical labor shortage of the American Revolution,

women took up the trades their husbands left when they joined the army.

After the war, a new demand for finished products was created by the movement to lands beyond the Appalachian Mountains. This led to the rise of merchant capitalists who purchased raw materials and contracted for their conversion into fabric, clothing, and other goods. The manufacturing was done almost entirely in the home by women or families. The finished products were then collected by the merchant capitalists and sold to the country stores that served the new settlements. Eventually, factories began to be built, employing mostly women and children.

Beginning in the settled northeastern areas about 1790 and extending west and south over the next 50 years, manufactured products (yard goods, candles, brooms) began to replace those formerly made in the household. By 1810, a third of all fabric was produced outside the home.

The first spinning mill using machinery was opened in 1790 by Samual Slater at Pawtucket. Similar establishments followed soon after. Until the 1840s, women and children were most often selected to work in the factories because the most important concern to the manufacturers was having a regular work force. While hiring local farmers could lead to inconvenient and costly delays during plowing and harvest times, the labor of women and children could be purchased at minimal cost. Widows were most in demand, especially if they had children of working age.

According to W. Elliot Brownlee and Mary M. Brownlee, factory labor was very attractive to women because it had greater appeal than did domestic service by that time. However, as the mills drew many women away from domestic work, the wages of servants rose from 50 cents a week in 1815 to $1.25 or $1.50 a week by 1849.

Factory labor offered women a larger measure of social freedom and higher wages and status. Those incentives, however, were inadequate to lure significant numbers of men. At that time, the highly-skilled crafts were untouched by the factory system, and the new agricultural opportunities on western lands were attractive to many men.

But beginning in the 1840s, immigrants from Canada, Ireland, and Germany began to replace native-born females in the unskilled factory labor force. The immigrants were preferred because they were willing to work for lower wages, for longer periods of time, and with fewer complaints about working conditions.

Also by the 1840s, the factory system had spread to the skilled crafts. The gradual de-skilling process led to women competing against male immigrants for some of those jobs and men struggling to keep women out of those occupations. Many of those men felt that keeping women out of certain jobs was the only way of saving their own.

In 1850, women were most likely to be found in the following occupations:**

Occupation	Number of Women
Domestic Service	330,000
Clothing	62,000
Cotton Textiles	59,000
Teaching	55,000
Shoes	33,000
Wool	19,000
Hats	8,000

Changes in several industries were taking place at that time. One of those industries was shoe manufacturing. Women entered the field about 1750, sewing uppers and decorating women's slippers and shoes. That part of shoe-making became known as women's work because the women could work at home and fit the work into the household routine. The invention of the wooden shoe peg in 1811 brought both a lower-priced shoe and an even greater employment of women and children. Formerly, men shoemakers had done the heavy, more skilled work of sewing bottoms to uppers. The shoe peg meant that uppers and bottoms of lighter-weight shoes could be joined in a simple operation which employed lower-paid, unskilled women and children--resulting in a cheaper shoe.

The first sewing machine for leather was introduced in Lynn, Massachusetts in 1852. Production of hand-sewn shoes fell dramatically. Women who wanted work had to move into the factory on a full-time basis or purchase the expensive machines to use at home. The sewing machine caused a drop in the number of women in the industry as can be seen in the following table:**

	U.S Shoe Industry	
	1850	1860
Men	72,305	94,515
Women	32,949	28,515
Total	105,254	123,030

In fact, Census data show that the overall percentage of women in the U.S. labor force fell from 31 percent in 1850 to 23 percent in 1860, officially attributed to the industrial use of the sewing machine.

Actually, new machinery has been the most typical reason for substituting women for men or men for women in jobs. The textile industry went both ways in the nineteenth century. Spinning jennies, operated by women in cotton mills, were replaced in 1850 by spinning mules, heavy machines that required physical strength. The women were replaced by men. But in the 1890s, when the men were earning $12 to $14 per week and seeking higher pay, the mills took advantage of new ring-spinning machinery to replace the men with women who earned $6 to $8 per week.

When manufacturers of silk ribbons replaced hand looms operated by skilled male weavers with simpler machinery, female operators were recruited. But after high speed horizontal warping mills were developed, the women were replaced by men. It was thought that men responded better to stress.

As a result of changes in the machinery used in textiles, the relative proportions of males and females in that industry varied from region to region, also being influenced by local custom and available labor.

Another factor that contributed to the hiring of women was the scientific management that developed as a result of stiff competition in national and international markets. The demand for unskilled workers was increased by subdividing tasks and encouraging investment in labor-saving machinery. Women were thought to adapt more easily to routine work. For example, when the tasks of telephone operators were reduced to a manual of appropriate responses, operators became mostly women.

However, the rising dominance of heavy industry between 1880 and 1910 led to a hiring preference for men because Victorian attitudes were causing women to be thought of as too physically delicate for factory work. Those attitudes gained legal force through protective legislation regulating the working hours, wages, and conditions for women.

At that time, protective legislation was not directed toward men. In 1914, 27 states had some form of legislation protecting women. By 1917, 39 states had restrictions on hours. Six states had an eight-hour day and a 48-hour week for most women; 13 states had a nine-hour day and a 54-hour week. The remaining states varied their work weeks from 55 to 60 hours. Besides restricting the number of hours, there was often legislation on night work, sanitary conditions, and minimum wages for women.

That protective legislation, because it did not apply to men, had some adverse effects on women's employment as well as the obvious benefits. When it eliminiated night work for women, it deprived some women of high-skilled and well-paid jobs.

Protective legislation reduced the economic desirability of female employees. It did not pay to change the hours for a whole facility nor to keep two sets of hours. Employers could hire men and not have to deal with restrictions. Women were put into a special work category, thus encouraging a stratified work force. Fewer manufacturing jobs were being defined as women's work, while a variety of areas within the service sector were being seen as appropriate for women.

One of those areas was office work. Until the last part of the nineteenth century, the typical office clerk was a trusted assistant who handled the books and kept track of inventory or a personal secretary who wrote letters, kept appointments, and served as confidante. The clerk was usually a man.

The first female stenographers transcribed into longhand the shorthand notes taken in court by male court reporters. In those days, court reporting was considered inappropriate for women--in part, because of too much strain on the job and in part, because women could not be permitted to hear revolting testimony.

Rapid business growth finally widened the opportunities for women in the clerical field. Although employers were initially reluctant to hire women because they were feared to be a distracting influence, women began to be hired because they could be paid about half of what men would get. With the introduction of the commercial typewriter in 1873 and the shift-key model in 1878, business schools began training women as "typewriters" (those who operated typing machines), stenographers, and bookkeepers.

By the 1890s, the typewriter was in general use. The machine required nimble fingers, assumed to be an attribute of women. In addition, the work was clean. Large numbers of women not previously employed began looking for work. Office work was seen as sustaining women's roles by extending their home functions to the job. Women could gain experience in caring for men in the office before they had to do so at home. By the 1920s, office work was considered "women's work."

In 1900, almost 29 percent of all bookkeepers and accountants and more than 75 percent of all stenographers and "typewriters" were women. The following table illustrates the rapid growth of women in the industry:**

Women in Office Work

Year	Number of Women
1870	9,982
1880	28,698
1890	168,808
1900	238,982

Other occupations which became predominately female were retail sales, teaching, and nursing. Although some women had worked in stores in colonial days, store owners usually hired men because it was thought that women customers preferred to be waited on by men. As the young men began to be lured by the westward movement, job opportunities became available for women. The Civil War provided even more store clerk openings for women. By 1890, 20 percent of all store workers were women.

The early teachers were also men. But when towns could pay only low wages, especially

after the Panic of 1837, they began hiring more women. The Civil War again contributed more job opportunities for women. In Massachusetts alone, the proportion of teachers who were male had dropped from 50 percent in 1840 to 14 percent in 1865.

Nursing also began as an occupation dominated by men. It was not until the Civil War shortage of nurses that women entered the profession in large numbers. During the Victorian era, a concept was developed of nursing as a transfer of women's duties from the home to the workplace.

Opportunities remained good for women in both teaching and nursing because neither governments nor private charities could compete with factories, farms, and shops for the labor of men.

In contrast to nursing, the first physicians in this country were women. The most common type of doctor during colonial times was the midwife. In fact, most midwives were women until about 1800, when men were being attracted in large numbers to the field by the high amounts of money to be made there. By 1840, the male midwives had obtained control of the medical schools which transformed midwifery into obstetrics. At that time, women did not have equal access to higher education so that the only opportunities for women in the medical profession were as midwives on the Western frontier.

Around the turn of the century, there was an increased demand for women doctors due to the Victorian modesty which would allow a female patient to be examined only by a female doctor. That demand lasted until about 1910 when increasing costs of laboratory and hospital facilities forced some medical school closures and consolidations. Fewer schools led to fewer opportunities for women. However, women continued to predominate in the medical-related fields of physiotherapy and dental hygiene.

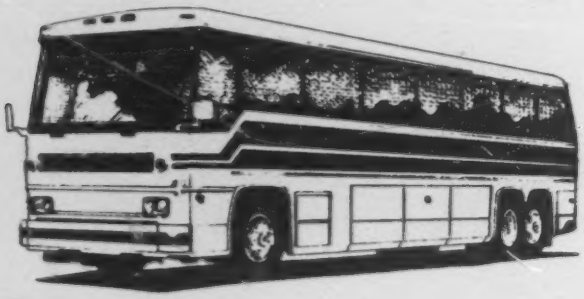
The Depression of the 1930s encouraged employers to streamline their operations in order to maximize efficiency. Some began to replace expensive skilled workers (men) with less expensive and less skilled workers (women). Only a few men moved into women's jobs in teaching, social work, and libraries. Men gained jobs among elevator operators, janitors, college professors, and musicians. Women gained in leather and glass production and in electrical equipment manufacturing. However, social pressure encouraged some women to give up their jobs so that men with families could have them.

Also during the Depression, the National Recovery Administration encouraged firms to get together within industry groupings and create a series of codes to regulate production, wages, and prices. Among other changes, those codes reduced the average number of hours worked for all employees to a standard of 40 hours per week and severely regulated home work. Although the codes were declared unconstitutional in 1935, they had helped encourage protective legislation for men as well as for women, thus contributing to some equality in the job market.

Except during World War II when women were needed to work in shipyards, steel mills, and ammunition factories, the pattern of women's work remained essentially the same until the 1970s. Even though the number of women in the labor force grew, jobs remained sex-segregated.

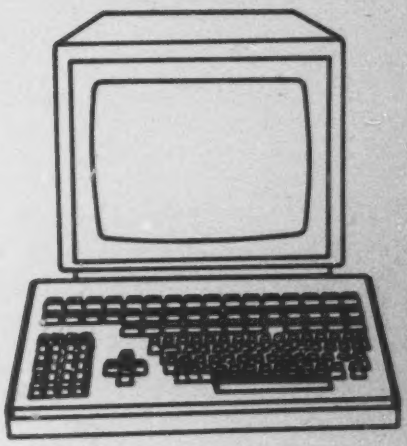
But during the 1970s and into the 1980s, changes started taking place. Many of the

barriers (both legal and social) which restricted jobs to just one sex began to be removed. Women were becoming bus drivers and construction workers. Men were becoming nurses and secretaries. Shifts were again occurring as have happened throughout history. According to the 1980 Census, almost 22 percent of all clerical and administrative support workers and 15 percent of all registered nurses and therapists in Arizona were men. Forty percent of bus drivers were women.



The factors most responsible for shifts in the gender composition of an occupation are the available labor supply and technology. During wars, when men were not available, women were hired into jobs they otherwise would not have been hired for. The current shifts may be very different from those in the past in that both men and women are now available for jobs. Due to many reasons (fewer children, high divorce rate, etc.), more women are entering the labor force than ever before. These changes will not end in just a few years as they used to after a war ended.

Technology is also changing at a very fast pace. Personal computers, robotics, and various technological advances which occur every day will continue to have tremendous impact on the work force. However, these current shifts in gender composition may not mean substituting one sex for another. It may be that we are headed for integration--not "men's work" or "women's work," but just work.



Barbara Keene

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* Sandy Thompson, "Male Secretaries: A New Perspective," The Secretary, April 1985, pp. 26-27.

** Barbara Mayer Wertheimer, We Were There (New York: Pantheon books, 1977), pp. 61, 86, 159.

SOURCES: Kessler-Harris, Alice. Women Have Always Worked. Old Westbury, New York: The Feminist Press, 1981.

Kessler-Harris, Alice. Out to Work. New York: Oxford University Press, 1982.

Brownlee, W. Elliot and Brownlee, Mary M. Women in the American Economy. New Haven: Yale University Press, 1976.

Hernandez, Ruth Robinson. Job Options for Women in the 80s. U.S. Department of Labor. Women's Bureau, Division of Information and Publications, 1980.

The Leading 10 Occupations of Women Workers 1870-1980
(In Order Of Size and as Reported in Each Census, Regardless of Changes in Definition)

	1870	1900	1930	1950	1970	1980
1.	Domestic Servants	Servants	Other Servants, Other Domestic and Personal Service	Stenographers, Typists, and Secretaries	Secretaries	Typists
2.	Agricultural Laborers	Farm Laborers (members of family)	Teachers (school)	Other Clerical Workers	Sales Clerks (retail trade)	Secretaries
3.	Tailoresses and Seamstresses	Dressmakers	Stenographers and Typists	Saleswomen	Bookkeepers	Sales Workers (retail & personal services)
4.	Milliners, Dress and Mantua Makers	Teachers	Other Clerks (except clerks in stores)	Private Household Workers	Teachers (elementary school)	Teachers (elementary school)
5.	Teachers (not specified)	Laundry Work (hand)	Saleswomen	Teachers (elementary school)	Typists	Bookkeepers, Accounting, & Auditing Clerks
6.	Cotton-mill Operatives	Farmers and Planters	Farm Laborers (unpaid family workers)	Waitresses	Waitresses	Cashiers
7.	Laundresses	Farm and Plantation Laborers	Bookkeepers and Cashiers	Bookkeepers	Sewers and Stitchers	General Office Clerks
8.	Woolen-mill Operatives	Saleswomen	Laundresses (not in laundry)	Sewers and Stitchers, Manufacturing	Nurses, Registered	Waitresses
9.	Farmers and Planters	Housekeepers and Stewards	Trained Nurses	Nurses, Registered	Cashiers	Nurses, Registered
10.	Nurses	Seamstresses	Other Cooks	Telephone Operators	Private Household Cleaners and Servants	Nursing Aides, Orderlies, and Attendants

SOURCES: Baxandall, Rosalyn; Gordon, Linda; Reverby, Susan, eds. America's Working Women. New York: Vintage Books, 1976.

1980 Census of Population, Detailed Population Characteristics, United States.

The Arizona Labor Force in May

Unemployment dropped only one-tenth of a percent in May, holding near to the 6.5 percent level sustained for the four previous consecutive months. Maricopa County's rate fell by a like amount, while Pima County fell three-tenths of a percent. In the rural counties, unemployment rates fell in all but Pinal, Santa Cruz, and Yuma counties.

Thirty-five hundred more jobs paying wages and salaries were added in May. Counter to the trend that has been prevailing for months, the rural counties enjoyed a disproportionately large share of the gain. Although the rural counties have only 16 percent of the state's wage and salary employment, they won 28 percent of the net gain in May, or 1,025 jobs. Of course, much of the gain is seasonal; and the northern counties of La Paz, Mohave, Yavapai, Coconino, Navajo, and Apache collectively gained employment (1,600 jobs) while the southern counties of Yuma, Santa Cruz, Cochise, Graham, Greenlee, Gila, and Pinal collectively lost employment (575 jobs). Nevertheless, the rural net gain was nearly double the normal seasonal amount while the urban net gain was a little better than half the normal seasonal amount. Not only are the northern counties staffing up for a good tourist season, but lumber and wood products manufacturers are adding significant numbers.

Construction added 1,300, achieving a record level of 114,800 statewide. By the most recent comparative statistics available (March 1986), Arizona had the highest concentration of construction employment in the United States with 8.2 percent of statewide wage and salary employment.

Manufacturing enjoyed a moderate 500 gain in May. Two hundred of the gain was in construction-related stone, clay, and glass manufacturing. Defense-related aircraft and missile manufacturing also added a hundred. Over the year, the defense component gains have just about balanced nondefense machinery manufacturing losses of about 5,000 jobs--confirming that only half of high-tech is healthy.

Retail Trade also showed some ill health. Although a seasonal gain of better than 500 would be expected, a 500 loss was experienced. Restaurants and bars took the largest losses and the highly competitive food store component added to those losses.

Finance, Insurance, and Real Estate has been growing well this year. In fact, it has had the greatest rate of growth (5.5 percent) for the first five months of the year of any private sector industry. In May, the industry posted another greater than seasonal gain of 600. Regional banking, mortgage refinancing, and a booming construction industry have contributed to its growth. Five out of six of those new jobs were in Maricopa County.

There is little to be said about the Services industry in May other than it added a weak 300. Tourism-related activity took its usual seasonal flip-flop from the southern part of the state to the cooler northern counties. Of course, a very good tourist season is anticipated up north. The Grand Canyon has already seen a 7 percent increase over this time last year in the number of visitors.

Government has been gaining employment in the first five months of the year at a rate greater than the private sector industries (6.4 percent). In the first four months, the gain was nearly all in schools, but in May the gains were in federal, state, and city governments. Schools and county governments remained stable or lost employment. Government's gain of 1,100 in May was second only to the construction industry's in the number of new jobs.

In summary, May was a good month for employment growth, but only half as good as in the previous three years. A perceptible slowing of the economic situation is occurring. Despite the minor blip downward of the unemployment rate, there is no reason to believe it will continue in that direction. If employment growth continues to slow, it will be difficult to absorb continuing inmigration. In addition, next month will see the influx of student job hunters. While the unemployment rate may not rise, it at least is unlikely to fall.

Ron Simon

Arizona Labor Force and Employment

May 1986 (in thousands)

	ARIZONA				
	May.* 1986	Apr. 1986	May. 1985	-- Amt Change -- Apr. to May.	1985 to 1986
TOTAL CIVILIAN LABOR FORCE**	1577.8	1571.7	1470.4	+6.1	+107.4
Total Unemployment	99.9	98.9	97.0	+1.0	+2.9
Rate	6.3	6.3	6.6	---	---
Rate (Sea. Adj.)***	6.4	6.5	6.7	---	---
Total Employment	1477.9	1472.8	1373.4	+5.1	+104.5

The Above Labor Force Statistics Should No

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT BY PLACE OF WORK

TOTAL WAGE AND SALARY	1347.1	1343.6	1284.0	+3.5	+63.1
Manufacturing	182.0	181.7	180.3	+0.3	+1.7
Durable Goods	143.5	143.0	143.2	+0.5	+0.3
Stone, Clay and Glass	8.0	7.8	8.0	+0.2	+0.0
Primary and Fabricated Metals	16.2	16.1	17.6	+0.1	-1.4
Primary Metals	7.7	7.7	7.8	+0.0	-0.1
Fabricated Metals	8.5	8.4	9.8	+0.1	-1.3
Machinery	64.5	64.6	69.5	-0.1	-5.0
Other Durable Goods	54.8	54.5	48.1	+0.3	+6.7
Aircraft and Missiles	26.5	26.4	21.3	+0.1	+5.2
Lumber and Wood Products (Except Furniture)	7.5	7.4	7.3	+0.1	+0.2
All Other Durable Goods	20.8	20.7	19.5	+0.1	+1.3
Nondurable Goods	38.5	38.7	37.1	-0.2	+1.4
Food and Kindred Products	8.8	8.8	8.1	+0.0	+0.7
Apparel	4.6	4.8	4.6	-0.2	+0.0
Printing and Publishing	14.9	14.9	14.2	+0.0	+0.7
All Other Nondurable Goods	10.2	10.2	10.2	+0.0	+0.0
Mining and Quarrying	10.6	10.7	12.0	-0.1	-1.4
Copper Mining	8.1	8.2	9.4	-0.1	-1.3
Other Mining and Quarrying	2.5	2.5	2.6	+0.0	-0.1
Construction	114.8	113.5	111.9	+1.3	+2.9
Trans., Communications, and Public Utilities	64.1	64.0	62.6	+0.1	+1.5
Transportation	28.6	28.7	29.2	-0.1	-0.6
Communications and Public Utilities	35.5	35.3	33.4	+0.2	+2.1
Trade	333.5	333.6	312.9	-0.1	+20.6
Wholesale Trade	66.4	66.0	63.2	+0.4	+3.2
Retail Trade	267.1	267.6	249.7	-0.5	+17.4
General Merchandise and Apparel	40.4	40.4	39.5	+0.0	+0.9
Food Stores	40.3	40.5	37.2	-0.2	+3.1
Automotive and Service Stations	33.1	32.5	30.4	+0.6	+2.7
Eating and Drinking Places	96.6	97.4	90.2	-0.8	+6.4
Other Retail Trade	56.7	56.8	52.4	-0.1	+4.3
Finance, Insurance, and Real Estate	89.4	88.8	79.9	+0.6	+9.5
Services and Miscellaneous	320.7	320.4	299.9	+0.3	+20.8
Hotels and Other Lodging Places	32.9	32.9	30.5	+0.0	+2.4
Business Services	72.6	72.2	67.1	+0.4	+5.5
Health Services	78.0	78.0	73.9	+0.0	+4.1
Other Services	137.2	137.3	128.4	-0.1	+8.8
Government	232.0	230.9	224.5	+1.1	+7.5
Federal	41.3	41.1	40.9	+0.2	+0.4
State and Local	190.7	189.8	183.6	+0.9	+7.1
School	113.8	113.8	112.2	+0.0	+1.6

* Preliminary
** Labor force, unemployment, and employment are reported by place of residence.
*** Normal seasonal variations have been eliminated to reflect underlying economic trends.
NOTE--Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

May 1986 (in thousands)

MARICOPA COUNTY					PIMA COUNTY				
			-- Amt Change --					-- Amt Change --	
May.* 1986	Apr. 1986	May. 1985	Apr. to May.	1985 to 1986	May.* 1986	Apr. 1986	May. 1985	Apr. to May.	1985 to 1986
979.9	976.0	907.2	+3.9	+72.7	309.7	309.5	288.6	+0.2	+21.1
49.0	48.5	46.7	+0.5	+2.3	16.0	16.6	15.1	-0.6	+0.9
5.0	5.0	5.1	---	---	5.2	5.4	5.2	---	---
5.0	5.1	5.2	---	---	5.3	5.6	5.4	---	---
930.9	927.5	860.5	+3.4	+70.4	293.7	292.9	273.5	+0.8	+20.2

Be Used for Economic Assistance Programs

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT BY PLACE OF WORK

887.8	885.5	843.6	+2.3	+44.2	245.8	245.2	233.6	+0.6	+12.2
129.4	129.3	130.7	+0.1	-1.3	32.9	32.8	31.0	+0.1	+1.9
103.2	103.1	104.9	+0.1	-1.7	27.6	27.6	26.1	+0.0	+1.5
4.9	4.8	4.9	+0.1	+0.0					
10.5	10.5	11.6	+0.0	-1.1					
50.8	50.8	55.5	+0.0	-4.7					
37.0	37.0	32.9	+0.0	+4.1					
26.2	26.2	25.8	+0.0	+0.4	5.3	5.2	4.9	+0.1	+0.4
5.6	5.6	5.5	+0.0	+0.1					
2.9	2.9	2.9	+0.0	+0.0					
10.8	10.8	10.3	+0.0	+0.5					
6.9	6.9	7.1	+0.0	-0.2					
0.6	0.6	0.6	+0.0	+0.0	1.6	1.6	2.4	+0.0	-0.8
80.4	79.3	78.5	+1.1	+1.9	22.0	21.9	21.2	+0.1	+0.8
42.0	41.9	40.8	+0.1	+1.2	9.3	9.3	9.5	+0.0	-0.2
19.5	19.5	19.7	+0.0	-0.2	4.5	4.5	4.5	+0.0	+0.0
22.5	22.4	21.1	+0.1	+1.4	4.8	4.8	5.0	+0.0	-0.2
229.1	229.5	213.7	-0.4	+15.4	55.3	55.0	51.9	+0.3	+3.4
53.4	52.8	50.6	+0.6	+2.8	7.6	7.6	7.3	+0.0	+0.3
175.7	176.7	163.1	-1.0	+12.6	47.7	47.4	44.6	+0.3	+3.1
26.0	26.1	25.3	-0.1	+0.7	7.1	7.1	7.3	+0.0	-0.2
25.6	25.9	23.8	-0.3	+1.8	7.1	7.0	6.1	+0.1	+1.0
21.3	20.9	19.3	+0.4	+2.0	5.7	5.6	5.1	+0.1	+0.6
63.2	64.0	58.8	-0.8	+4.4	18.1	18.2	16.6	-0.1	+1.5
39.6	39.8	35.9	-0.2	+3.7	9.7	9.5	9.5	+0.2	+0.2
70.2	69.7	62.2	+0.5	+8.0	12.9	12.7	11.6	+0.2	+1.3
218.6	218.6	203.6	+0.0	+15.0	59.6	59.7	55.2	-0.1	+4.4
18.7	18.9	17.6	-0.2	+1.1	5.7	5.8	4.8	-0.1	+0.9
59.4	59.1	55.1	+0.3	+4.3	10.5	10.4	9.3	+0.1	+1.2
52.5	52.6	49.5	-0.1	+3.0	16.1	16.1	15.5	+0.0	+0.6
88.0	88.0	81.4	+0.0	+6.6	27.3	27.4	25.6	-0.1	+1.7
117.5	116.6	113.5	+0.9	+4.0	52.2	52.2	50.8	+0.0	+1.4

-- Prepared by Labor Market Information, Research and Analysis (CPS, 1/86)

Nonmetropolitan Counties
Labor Force and Employment
May 1986

	Apache	Cochise	Coconino	Gila	Graham	Green-lee	La Paz
TOTAL CIVILIAN LABOR FORCE*.	15,050	35,875	39,800	12,350	7,925	3,000	4,675
Total Unemployment	2,150	2,675	3,125	1,725	800	300	700
Rate	14.3%	7.5%	7.9%	14.0%	10.1%	10.0%	15.0%
Rate (Seas. Adj.)**. . . .	15.5%	7.6%	8.4%	14.5%	10.0%	9.4%	-INA-
Total Employment	12,900	33,200	36,675	10,625	7,125	2,700	3,975
THE ABOVE LABOR FORCE STATISTICS SHOULD NOT BE USED FOR ECONOMIC ASSISTANCE PROGRAMS							
TOTAL WAGE AND SALARY. . . .	14,950	24,675	35,925	9,950	4,775	2,800	2,725
Manufacturing.	750	2,100	2,850	1,325	175	0	100
Mining and Quarrying	25	125	50	1,250	0	1,675	0
Construction	950	1,250	1,725	425	150	125	125
Trans., Comm., & Pub. Util..	1,700	1,675	2,925	400	150	50	50
Trade.	1,500	5,375	8,075	1,875	1,250	275	900
Fin., Insur., & Real Estate.	275	700	775	275	125	25	100
Services and Miscellaneous .	4,475	3,725	8,775	1,850	825	75	650
Government	5,275	9,725	10,750	2,550	2,100	575	800

	Mohave	Navajo	Pinal	Santa Cruz	Yavapai	Yuma
TOTAL CIVILIAN LABOR FORCE*.	26,975	25,700	34,775	9,175	33,125	39,825
Total Unemployment	2,525	3,025	4,200	1,150	2,025	10,550
Rate	9.4%	11.8%	12.1%	12.5%	6.1%	26.5%
Rate (Seas. Adj.)**. . . .	9.4%	13.2%	12.2%	14.4%	6.2%	-INA-
Total Employment	24,450	22,675	30,575	8,025	31,100	29,275
THE ABOVE LABOR FORCE STATISTICS SHOULD NOT BE USED FOR ECONOMIC ASSISTANCE PROGRAMS						
TOTAL WAGE AND SALARY. . . .	18,600	19,575	26,250	8,175	21,975	23,525
Manufacturing.	2,400	1,850	3,125	1,175	2,350	1,650
Mining and Quarrying	275	1,125	3,400	0	575	25
Construction	1,250	1,050	1,375	350	2,025	1,600
Trans., Comm., & Pub. Util..	1,100	1,500	900	500	950	925
Trade.	5,250	3,700	4,875	3,225	5,525	7,300
Fin., Insur., & Real Estate.	925	350	725	250	925	900
Services and Miscellaneous .	3,900	5,175	2,875	1,175	4,675	4,350
Government	3,500	4,825	8,975	1,500	4,950	6,775

*Adjusted to the Current Population Survey (CPS) to reflect place of residence.
**Seasonal adjustment not applicable for economic assistance programs.

NOTE--Series for Yuma and La Paz counties start January 1983. Data are not comparable to any past series.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

Arizona Labor Force and Employment for Economic Assistance Programs May 1986

County	Civilian Labor Force	Employment	Unemployment	Rate
Statewide	1,577,798	1,477,855	99,943	6.3%
Apache	15,048	12,890	2,158	14.3
Cochise	35,855	33,176	2,679	7.5
Coconino	39,777	36,659	3,118	7.8
Gila	12,332	10,616	1,716	13.9
Graham	7,916	7,122	794	10.0
Greenlee	2,936	2,639	297	9.9
La Paz	4,677	3,968	709	15.2
Maricopa	979,446	930,485	48,961	5.0
Mohave	27,561	25,034	2,527	9.2
Navajo	25,697	22,667	3,030	11.8
Pima	309,649	293,618	16,031	5.2
Pinal	34,766	30,563	4,203	12.1
Santa Cruz	9,158	8,020	1,138	12.4
Yavapai	33,108	31,082	2,026	6.1
Yuma	39,812	29,256	10,556	26.5

These figures are the only official BLS labor statistics to be used for revenue sharing purposes. They are not designed to be used as economic indicators. Note: Series for Yuma and La Paz counties start January 1983. Data are not comparable to any past series.

Estimated Hours and Earnings of Production Workers in Selected Industries in Arizona May 1986

INDUSTRY	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVG. HOURLY EARNINGS		
	MAY * 1986	APR. 1986	MAY 1985	MAY * 1986	APR. 1986	MAY 1985	MAY * 1986	APR. 1986	MAY 1985
FOR THE STATE OF ARIZONA*	400.98	401.39	386.91	41.9	41.0	40.9	9.78	9.79	9.46
Manufacturing	INA	INA	INA	INA	INA	INA	INA	INA	INA
Aircraft & Missiles	376.27	380.26	359.53	40.2	40.8	42.1	9.36	9.32	8.54
Food & Kindred Products	516.26	513.13	506.62	39.2	39.2	40.4	13.17	13.09	12.54
Primary Metals	360.89	363.80	338.64	39.1	39.5	39.7	9.23	9.21	8.53
Machinery	566.78	576.28	567.32	40.6	40.9	41.2	13.96	14.09	13.77
Copper Mining	451.66	460.50	433.87	36.9	37.5	36.8	12.24	12.28	11.79
Construction	595.55	612.37	572.88	42.6	43.4	43.4	13.98	14.11	13.20
Utilities	237.47	243.40	233.64	33.4	33.9	33.0	7.11	7.18	7.08
Retail Trade**	386.72	379.99	358.41	40.2	39.5	39.0	9.62	9.62	9.19
Wholesale Trade									

* Preliminary
** Excludes eating and drinking places.
NOTE--These estimates are based on a sample of full and part-time production and related employees whose payroll and hours are reported for the pay period which includes the 12th of the month. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

--Prepared by Labor Market Information, Research and Analysis (1972 SIC, 1/86)

The 1986 Industry Classification Refiling

Every three years, the Arizona Department of Economic Security (DES) Research Administration staff collects information from each Arizona employer on the firm's primary business activity. This triennial update is sponsored by the U.S. Bureau of Labor Statistics (BLS) and is the basis for their Employment and Wages program, commonly called the ES-202 program, headed in Arizona by Mickey Gamez of the DES Research Administration.

There are ten major industry divisions in all, and the four due for refiling this year are the: (1) mining, (2) manufacturing, (3) construction, and (4) transportation; communications; electric, gas, and

sanitary services industries. The Standard Industrial Classification (SIC) Manual is used by the ES-202 program analysts to assign each employer an SIC code based on the firm's primary business activity.

The information is collected from employers by use of the Industrial Verification Statement, which has been mailed out to the mining and manufacturing industries already and will be mailed to the other two industries later this year. The purpose of this form is to ensure that the correct SIC code and geographical area code are assigned to each employer. They are simply asked to report their principle product, group of products produced or distributed, or services rendered.

The information gathered in this ES-202 process is invaluable to state and national statisticians, economists, and others. For example, the SIC system is the base upon which the Unemployment Insurance (UI) Employer Name and Address File is built. This file serves as a sampling frame for most establishment surveys. Many BLS programs are affected directly by the SIC--mainly the ES-202 program. From this program, county-level employment and wage data are available. The data items include monthly employment, total wages, and number of reporting units.

Employment estimates of states' Current Employment Statistics (CES) programs are adjusted annually to the employment levels of the ES-202 program. These CES statistics appear each month as the four pages of "Arizona Labor Force Statistics" in this Newsletter. ES-202 data are also used to compute state insured unemployment rates for workers covered by UI programs and national averages of these rates. These can trigger federally-subsidized extended UI benefit programs. State governments also use ES-202 data in econometric models to determine projected income tax revenues.

Nationally, the Bureau of Economic Analysis in Washington, D.C. uses ES-202 data as a base for developing a large part of the wage and salary component of Personal Income (PI) and Gross National Product (GNP) statistics.

In fact, so many statistics emanate from the proper filling out of the Industrial Verification Statement, that the need for employers to respond with accurate and timely information cannot be overemphasized. Their cooperation in this effort every three years is greatly appreciated.

If employers have questions or desire further information about the ES-202 report or the Industrial Verification Statement, they may call 255-3871 in the Phoenix metropolitan area or 1-800-321-0381 from anywhere else in the state.

New Labor Market Information (LMI) Publications Now Available

The two Affirmative Action Planning Information booklets for the State of Arizona, Maricopa and Pima counties, and the large cities within; and the non metropolitan counties will be available this month. The Census Table 3, the area's occupational ethnic/sex breakdowns, will not be included in the two publications, but is available on request.

The publication, 1985 Job Bank Wage Levels gives wage rates offered by employers to

job placements through the Department of Economic Security's Job Bank. This report states low, weighted average, and high wage levels for up to 600 occupations in the state, its counties, and 25 cities.

The Research Administration is glad to announce the availability of the publication, Arizona Labor Turnover: A Significant Reality. This report contains both statewide and countywide turnover data since 1982. Besides data transmission, the report deals with an analysis of the response of employment and turnover indicators to cyclical patterns in Arizona. It examines the changes in turnover indicators in major industrial categories in order to trace the development of recovery from the bottom of the recession in 1982. At the end, the report discusses the major implications of different labor turnover measures and their potential use by job training institutions, planners, reseachers, and individual firms; and for making estimates of occupational employment opportunities.

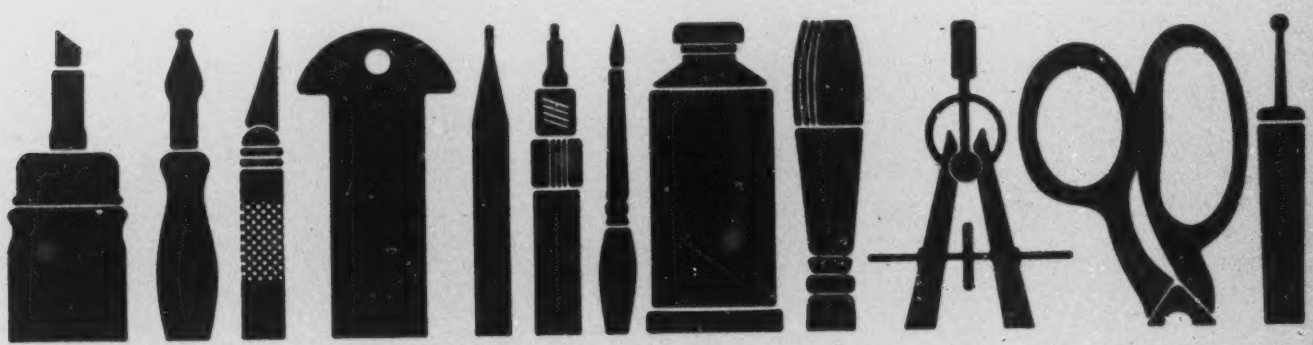
For vocational program planners and counselors, a new Occupational Information System (OIS) of Arizona report has been released entitled:

1986 OIS Cluster Summary Report By:

1. Vocational training program areas;
2. Ranked by 1986 occupational employment;
3. Ranked by 1986 job openings; and
4. Ranked by 1986 job openings minus training completers.

This is designed as a "management" type report which can be utilized in setting priorities. This report utilizes the OIS vocational training clusters. It brings together and summarizes information from the following sources: Occupational Employment Statistics (OES) program, Job Service, Unemployment Insurance (UI), Apprenticeship Services, secondary schools, community colleges, proprietary schools, and community-based organizations. (To obtain a copy, request OIS Report 86-6.) Detailed printouts for any OIS cluster can be obtained through the MICRO OIS which is discussed elsewhere in this Newsletter.

The above reports can be obtained by writing to the address on the back of this Newsletter or by calling (602) 255-3871.



Vocational Planning and the 1986 MICRO OIS of Arizona

The Occupational Information System (OIS) of Arizona has now released the 1986 version of its microcomputer data base--the MICRO OIS--for vocational planners, evaluators, and career counselors. Two new enhancements have been added. All occupations--vocational and professional--from the Occupational Employment Statistics (OES) program are now included. Also, data from the Arizona Department of Economic Security (DES) Small Employer Wage Survey and the Arizona Department of Administration (DOA) Large Employer Wage Survey are now included.

The MICRO OIS of Arizona includes training data from secondary schools, community colleges, private schools, community-based organizations, and the Job Training Partnership Act (JTPA) by vocational training area. The MICRO OIS includes data on apprenticeship completers, Job Service job applicants and job orders, Unemployment Insurance (UI) applicants, and hourly wage data from job orders. The Job Service data covers over 3,500 Dictionary of Occupational Titles (DOT) code occupations. The data to be available are summarized below.

The MICRO OIS of Arizona permits retrieval of information using a direct access mode or a search mode. The direct access mode permits retrieval of data by entry of occupational title (e.g., electronic technician) or code (e.g., a DOT code). The search mode permits retrieval of data based on employment or training levels, growth rates, wage rates, and by other variables.

A key element of this system is the clustering of occupations with related training areas. A supply and demand report may be printed out for a given cluster which pulls together occupational demand information with training supply information. This information is organized in a way that maximizes its usefulness for planning and decision-making purposes. There are currently

Information by Occupation or Vocational Training Area Available Statewide and by County in The MICRO OIS*

Type of Information	Statewide	County
1986 Estimated employment	Yes	Yes
1991 Projected employment	Yes	Yes
1986-91 Annual replacement demand	Yes	Yes
1986-91 Annual growth demand	Yes	Yes
1986-91 Annual job openings	Yes	Yes
1984-85 Public secondary enrollments/completers	Yes	Yes
1984-85 Community college enrollments/completers	Yes	Yes
1984-85 Proprietary completers	Yes	Yes
1984-85 Community-based organization completers	Yes	Yes
1985 Job Training Partnership Act	No	No
1985 Job Service job openings	Yes	Yes
1985 Job Service openings/applicants ratio	Yes	Yes
1985 Job Service average wage	Yes	Yes
1985 Unemployment Insurance claimants	Yes	Yes
1985 Apprenticeship completers	Yes	Yes
1985 DES Small Employer Wage Survey data	Yes	Maricopa, Pima
1985 DOA Large Employer Wage Survey data	Yes	Maricopa, Pima, Balance of State

* Employment and demand data are by occupations based on the OES code. Education and training data are by vocational training area based on the Classification of Instructional Programs (CIP) code. Job Service, UI, and Apprenticeship data are by occupations based on the DOT code.

228 clusters. The MICRO OIS of Arizona is currently designed to run on an IBM microcomputer utilizing dBase III software. The software has been customized to provide a powerful and easily-used tool for vocational planning, evaluation, and counseling purposes. It is designed to be installed on user premises and is available for immediate installation at any site possessing an IBM-compatible PC with hard disk storage and a dBase III software package.

The MICRO OIS project was developed by the National Occupational Information Coordinating Committee (NOICC). Development and implementation in Arizona has been funded primarily by Vocational Education in the Arizona Department of Education. Arizona development and implementation is being carried out through the Arizona State Occupational Information Coordinating Committee (ASOICC). For further information, contact Hugo H. Soll, manager, OIS of Arizona, P.O. Box 6123, Phoenix, Arizona 85005, (602) 255-3680.

Hugo H. Soll

Arizona Unemployment Insurance Activities - April 1986

	April 1986	March 1986	April 1985	% Change From One Year Ago
Arizona Claimants Served*	30,052	30,409	25,374	+18.4%
Arizona Average Weeks Unemployed**	8.5	8.7	8.9	-4.5%
Arizona Benefits Paid*	$10,962,747	$9,979,272	$7,611,795	+44.0%
Arizona Trust Fund Balance	$345,560,866	$332,103,583	$266,088.244	+29.9%

*All Programs
**UI Only

New Developments

"New Developments" is featured each month as a service to employers and job seekers. It is a compilation of public announcements of the more significant new construction, grand openings, major hirings and layoffs, and other employer events that have special significance for Arizona labor markets. The announcements are paraphrased and otherwise edited from articles published in newspapers and other periodicals from throughout the state. "New Developments" are limited to space available, and no attempt is made to compile an exhaustive list of all such events that have occurred during the month.

EDUCATION - The 323-acre Arizona State University (ASU) Research Park, which has been under construction since 1984 on $26 million worth of land that formerly served as an experimental farm, is the first pure research park to be built in the United States since 1970, when most such activity by universities stopped for lack of funds or land. In fact, the renaissance in research parks, signified by ASU West, has attracted so much interest that the park's executive director, Reginald Owens, hosted a conference in Tempe to tell representatives of at least 250 U.S. universities and some 30 foreign campuses how it is possible to bring research parks out of the ground.

Everyone agreed with Mr. Owens that the two most famous true research parks in the U.S. are located in Palo Alto, California (Stan-

ford) and in Raleigh, North Carolina (The Research Triangle). While ASU is not trying to compete with these two, it will also offer a true research park--no manufacturing will take place there unless it is done on a small scale for product-testing purposes only. The true research park renaissance is part of a philosophical change sweeping through the thought centers of U.S. business, education, and government. The growing thought is that if the three forces do not begin to work together effectively, the American economy is doomed to inertia.

Interest in park construction is summed up in a buzzword that accurately describes what true research parks try to accomplish: technology transfer, or the taking of technical advancements from the lab to the market. It began with work in genetic research, says Mr. Owens. "It demonstrated the idea of a noted faculty member being able to come out with a major, major product, then commercializing it while (that faculty member) stayed at the university."

TOURISM - Tourists are coming by land (13 million a year) and by air (three million a year) to visit the state of Arizona. But while the numbers keep growing, state spending to promote tourism, the second-largest industry in the state, is not keeping pace, according to Phil Keene, director of the state Office of Tourism. While tourism officials have pleaded with the legislature for more money, the increases are meager compared to those in competing states. "The average state spends twice as much as we do," Keene said. "We have a background of a lack of support." This year, the legislature has agreed to allocate $3.4 million to promote tourism. The national average is $4.3 million.

Arizona's chief competitor for the tourism dollar is California, and one-third of our state's tourism base comes from the Golden State. While magazine, television, and outdoor advertising campaigns are conducted at different seasons of the year in targeted areas such as Salt Lake City, Denver, Chicago, Minneapolis, and Texas, campaigns are under way in California year round. "We cannot out-ocean or out-water them," Keene said. "But they do not have the Grand Canyon, Lake Powell, or Monument Valley." And while the private sector spends about 10 times as much as the state to promote tourism, it is not enough to eliminate the competition. All the money spent in the state by the Valley of the Sun Convention and Visitor's Bureau, the resorts, the Tourism department, and others in the private sector, could amount to as much as $30 to $40 million a year. But, Keene noted, "There are single attractions in California, such as Disneyland, that spend more than that."

EXPANSION - Construction is currently under way on a $1.5 million expansion of Poulson Plastic's facilities at Scottsdale Air Park. The new facilities will total 53,500 square feet, which will more than triple the size of Poulson's current plant in the same area. Of the total, 9,500 square feet will be a two-story office wing, manufacturing will occupy 17,500 square feet, and 24,500 square feet will be warehouse facilities.

Poulson Plastics manufactures disposable, high-volume, critical tolerance medical and electronic components. The company expects to add 60 employees over the next two years as manufacturing demands for its products increase.

Pixley Richards West Incorporated, which now employs approximately 307 workers in Tempe, is moving its national headquarters from that city to Gilbert, where it will expand operations. The firm is planning a 120,000 square foot building for the first phase of its expansion at the Fiesta Tech Center in Gilbert. The company announced that it will initially employ at least 450 people, and that number could eventually reach 800. The company engineers and manufactures high-technology, custom injection molding for such firms as AT&T, IBM, and Motorola. It expects to be in full operation at its new facility by February or March 1987.

"We are delighted to have Pixley Richards be a part of our community," Gilbert economic development director Kevin Smith said. "The fact that it is a headquarters is a

real plus. This is the first of several successes we look to have in the near future. We now have eight new industrial parks either just built or under construction."

CONSTRUCTION - Ground was broken in late May on the future site of Del E. Webb's first retirement community in Tucson--to be known as Sun City Vistoso. The project will be located on 1,000 acres about 10 miles northwest of Tucson in the hills west of Catalina State Park. The site, where 2,900 homes are planned over the next 10 years, is expected to accommodate an estimated 5,000 retired residents. Commercial, medical, and other amenities are also planned; and construction of an 18-hole golf course on 130 acres began in April.

Paul Tatz, president and chief executive of Del Webb, said the Vistoso venture is "a major step in our corporate history." He added that one-third of the project will be left as open space in an attempt to live up to the company's commitment to the desert environment.

All homes at Sun City Vistoso will be built by Webb and will range in price from just above $60,000 to $150,000, the company said. The first residents are expected to move in next March.

GRAND OPENING - After one and a half years of construction, the Motorola Government Electronics Group (GEG) has opened its aerospace operations facility in Chandler. The Chandler complex is to be used for the design, development, and production of electronic space communications equipment and systems. About 900 employees have been transferred from the group's Scottsdale facility on McDowell Road. Other phases to be added to the Chandler site will depend on Motorola's future needs, according to James Linicome, GEG general manager. A master plan calls for a maximum capacity of 6,000 employees and 1 million square feet of space on the 106-acre site. Motorola GEG employs 8,500 people in the Valley.

MINING - Sahuaro Petroleum & Asphalt Company has signed an agreement to purchase 60 acres of land, south of Coolidge, in Randolph. "The company will construct an asphalt refinery on the site with a projected capacity to produce 250,000 tons of asphalt per year," says L.S. "Bill" Brake. Brake says the refinery's completion will be coordinated with the completion of the 1,750-mile All-American pipeline, expected to be completed in 1987. It will transport heavy crude oil from California to the U.S. Gulf Coast refineries in Houston. Sahuaro will purchase and provide the refinery with the crude oil required for operation. "It is estimated that the overall Sahuaro project will take nine to 12 months to complete and cost approximately $10 million," Brake says. Once completed, he says, the refinery and auxiliary operations will create 50 to 60 new jobs.

MANUFACTURING - Meredith/Burda, the fourth largest full-service commercial printer in the United States, started up operations at its new $86 million plant in Casa Grande the second week in June. By 1988, the printing company plans to employ 350 people with an estimated annual payroll of about $10 million; making it the largest manufacturing employer in Casa Grande, a municipality of more than 16,000 residents.

Traditonally an East Coast printer serving the magazine and catalog market, Meredith/Burda is making the move to Arizona in an attempt to capture a percentage of the fast-growing printing market in the west, says A.R. Anderson, vice president and general manager of the Casa Grande plant. "If the market continues to expand in the west, then there is certainly the potential of adding more to our bindery and adding another press (in Casa Grande)." Anderson added, "In five years, we may grow to 500 or 800 employees."

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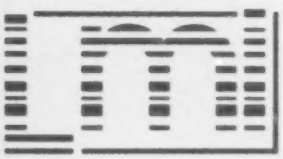

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